Prepare:	**While observing:**
☐ Discuss with the manager what you are observing and why so s/he understands how you'll use the information to problem-solve. Focus on this as an opportunity to learn what currently happens with customer feedback.	☐ Focus on what actually occurs, not what should occur.
☐ Talk with the team about what you are observing and why so they understand how you'll use the information. Ensure the team knows you are not "auditing" them.	☐ Be an unbiased observer, not an inspector.
☐ Plan to spend at least 30 – 60 minutes at the workplace observing. You may try several shorter periods of observation (15 – 20 min).	☐ Pay attention to interactions, both verbal and nonverbal.
☐ Choose times and locations that will allow you to observe the work being done. You may try to observe a team huddle or meeting to capture that particular dynamic.	☐ Record what you see and hear, along with any observable standards/expectations.
☐ Bring paper and pencil to document what you see and hear.	

What to look & listen for – define your own indicators of 'how you will know' (phrases, behaviors, visuals, etc.) the answers to the questions:

☐ Do employees clearly understand who the customer is? Do they understand how the customer defines value?

Look/listen for: (ex.: visual showing the customer, value stream map, employees' answers to questions, team discussions about customers, customer survey data)

☐ Do employees ask customers for feedback? How? How often? What is captured?

Look/listen for: (ex: verbal request for feedback, specific information requested/documented by employees, percentage of interactions where feedback is requested)

☐ What do employees do with customer feedback? Do teams discuss it? How? How often? What happens before, during, and after?

Look/listen for: (ex.: employee response – verbal or otherwise – to feedback, location(s) to find/share feedback, amount of time devoted to discuss feedback, length of time between capture and discussion/sharing, standards – posted or spoken – related to customer feedback)

☐ Is there visible evidence that customer feedback is captured? Shared? How? How often?

Look/listen for: (ex.: poster or white board to post key feedback, posted performance targets and actuals for feedback, frequency of teams visiting/discussing visuals/data)

☐ Is there visible evidence that employees use customer feedback to improve processes?

Look/listen for: (ex.: value stream map, visuals showing how prior feedback has improved the process)
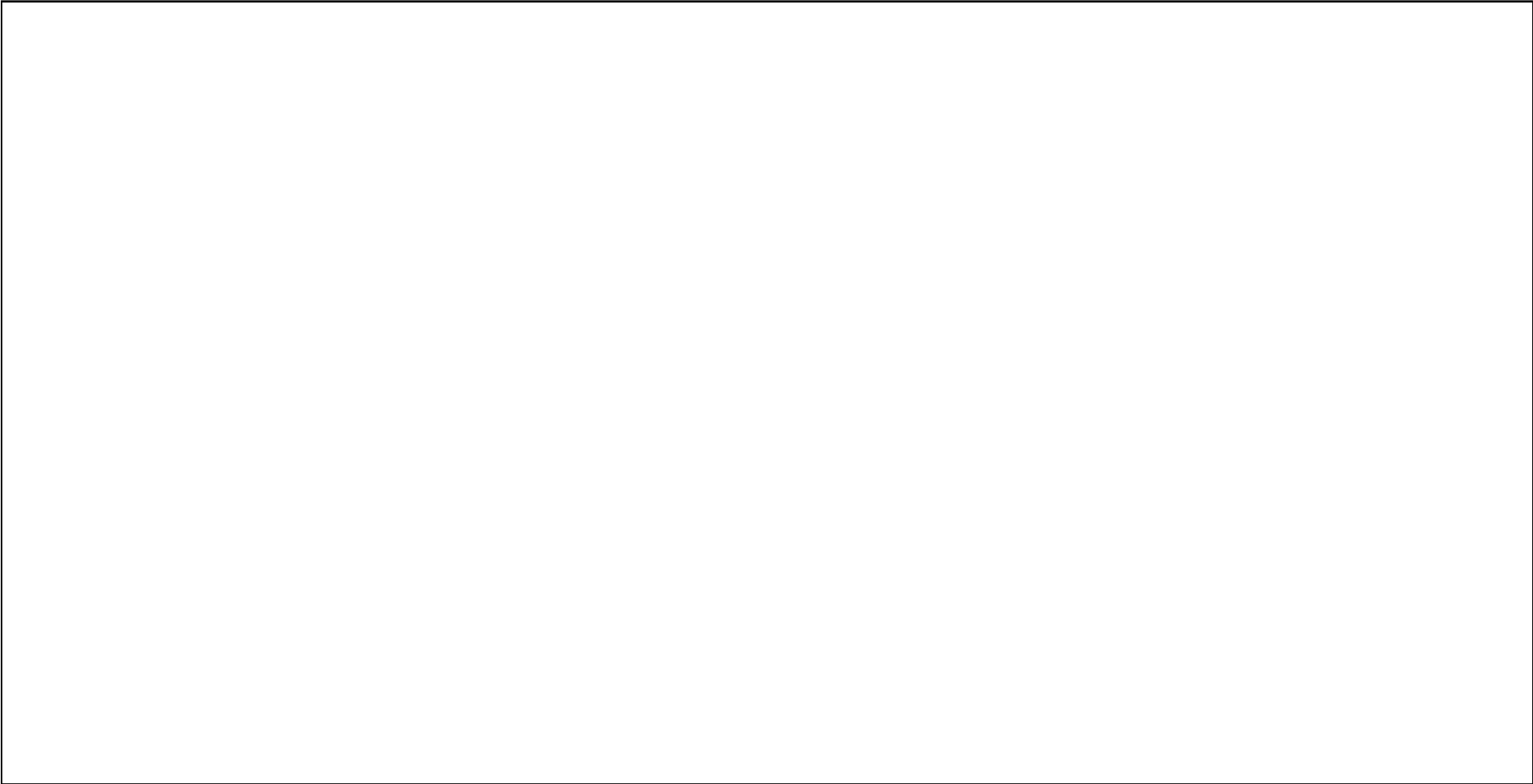
Optional activity:

☐ Ask some employees (one-on-one) about their last experience with customer feedback to find out what happened.

Observations:

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Draw a picture of current state (what you see and hear actually happening):

Reflect on what you observed. Questions to consider include:
- How does actual practice compare to standards/expectations?
- What appears to be "the process" for encouraging, soliciting, capturing, and using customer feedback?
- What does the feedback loop from customers to employees look like? How short and direct is the loop? How usable is the feedback? Provide specific examples from your observation.

Use your reflections to underline your current state drawing and identify a specific problem to be addressed first. This will inform the "Observe" step on the Problem-solving worksheet.

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Prepare:	**While observing:**
☐ Discuss with the manager what you are observing and why so s/he understands how you'll use the information. Focus on this as an opportunity to learn what currently happens around encouraging employees to come up with better ways of doing things.	☐ Focus on what actually occurs, not what should occur.
☐ Talk with the team about what you are observing and why so they understand how you'll use the information. Ensure the team knows you are not "auditing" them.	☐ Be an unbiased observer, not an inspector.
	☐ Pay attention to interactions, both verbal and nonverbal.
☐ Plan to spend at least 30 – 60 minutes at the workplace observing. You may try several shorter periods of observation (15 – 20 min).	☐ Record what you see and hear, along with any observable standards/expectations.
☐ Choose times and locations that will allow you to observe the work being done. You may try to observe a team huddle or meeting to capture that particular dynamic.	
☐ Bring paper and pencil to document what you see and hear.	

What to look & listen for – define your own indicators of 'how you will know' (phrases, behaviors, visuals, etc.) the answers to the questions:

☐ Do employees offer ideas for improvement? How? How often? Are they solicited? By whom?

Look/listen for: (ex.: supervisor asks for problems & ideas, clear place/method for employees to submit ideas, dates of last 3 ideas submitted)

☐ What is the response to ideas? How long does it take? Who responds? How?

Look/listen for: (ex: supervisor response – verbal or otherwise – to idea, length of time between submission and response, instant "thank you" and pledge to follow up)

☐ Is there visible evidence of employee ideas being captured? Discussed? Implemented?

Look/listen for: (ex.: idea boards showing ideas and status, idea cards or slips for employees to submit ideas, degree to which ideas have been added to or modified)

☐ Is there visible evidence of improvement from employee ideas?

Look/listen for: (ex.: chart of performance over time showing when ideas were implemented, newsletter or poster recognizing employees' ideas and their impact)

☐ Do teams discuss problems? How? How often? What happens before, during, and after?

Look/listen for: (ex.: number of times team has discussed problems and possible solutions in the last month, whether teams use the word "problem," standards – posted or spoken – related to problems or problem-solving, amount of time devoted to discussing problems/ideas, level of willingness to communicate problems)

☐ Do employees have a basis for improvement? What is it? (Performance target or baseline, definition of customer value, etc.) How is it communicated?

Look/listen for: (ex.: process performance data and goals posted, visual showing customer needs or impacts, time devoted in team discussions to improvement desired)

Optional activity:

☐ Ask some employees (one-on-one) about their last experience suggesting an improvement to find out what happened.

Observations:

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Draw a picture of current state (what you see and hear actually happening):

Reflect on what you observed. Questions to consider include:
- How does actual practice compare to standards/expectations?
- What appears to be "the process" for encouraging, soliciting, capturing, and implementing employee ideas?
- What seems to encourage employees to come up with better ways of doing things? What seems to discourage them? Provide specific examples from your observation.

Use your reflections to <u>inform your current state drawing</u> and <u>identify a specific problem to be addressed first</u>. This will inform the "Observe" step on the Problem-solving worksheet.

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Employee Engagement Problem Solving Guide for _Customer Feedback_ – Problem-solving Worksheet (with help text)

ISSUE – Which part of employees' experience are we talking about and why?

Nature of problem (gap) and why it matters:

Percent of employees who say we use customer feedback to improve work processes: Enter percent.	Goal/target: Enter percent.	Gap: Enter percent.

We need to close this gap now because Enter how this problem impacts customers. Why do we care about this issue? Example: the number of customers is increasing while resources are not, and we must keep up with demand while improving satisfaction with services.

ASK – What do we know now, and how will we narrow our focus to learn deeply about the problem?

Actions taken so far and their impact on the problem:

Describe strategies used and results achieved. For example, customer satisfaction surveys or Lean process improvements that include customers. How have these actions impacted employees' experience at work?

Where in the agency to focus this problem-solving effort:

Pick a group to focus on that is both **reasonably sized** and **representative of the population to be engaged** (e.g, similar work, shift, customers, etc). Criteria to consider include:
- Lower scores (greatest need) and/or connections to other survey items such as making improvements for customers (#10) and encouraging employees to innovate (#15).
- Higher customer impact (key business line).
- Other factors, such as function / body of work (e.g., call center, claims or benefits processing), employee turnover, or customer satisfaction data.

The group will be observed to identify current state, so the group should be connected somehow (e.g., location, function, leader, etc.).

OBSERVE – What is actually happening? What are employees experiencing that leads to the problem? (Use "Observe" Tool to complete this step)

Summary of current situation:

Describe what is going on in the workplace. Which problem (gap between what is and what should be) do we need to address first?

ANALYZE – What is the root cause of the specific problem that you can impact in your role?

Specific problem that prevents us from using customer feedback to improve our work processes:

State the primary problem from the observation.

Ask why this is happening until we get to root cause.

Why? Go see & confirm	**Why?** Go see & confirm	**Why?** Go see & confirm	**Why?** Go see & confirm	**Why?** Go see & confirm

EXPERIMENT: What will we try to solve the problem? (See what other agencies have tried in the Experiment Menu)

Objective:

What is the target result we're trying to achieve?

Hypothesis:

What action do we think will achieve the objective? Use this format: **If we** (try this), **then we** (will get that)

Measures:

How will we measure progress and success?

Plan to address the root cause and achieve the objective:

Action	Who	When

Do and then Check:

Conduct the experiment and compare the results (new state) to the original state from the Observe step. Did we achieve the objective? Was the hypothesis proven? What did we learn?

Next State	Next State
Check Date: Enter date	Check Date: Enter date
Results: Enter measure(s), goal(s), and results	Results: Enter measure(s), goal(s), and results
Objective Achieved? Yes ☐ No ☐	Objective Achieved? Yes ☐ No ☐
Key Learning Enter progress, lessons, etc.:	Key Learning: Enter progress, lessons, etc.

Act/Adjust:

What steps will we take next to continuously improve? How will we use what we've learned from the experiment?

Employee Engagement Problem Solving Guide for _Innovation_ – Problem-solving Worksheet (with help text)

ISSUE – Which part of employees' experience are we talking about and why?		
Nature of problem (gap) and why it matters: Percent of employees who feel encouraged to come up with better ways of doing things: Enter percent.	Goal/target: Enter percent.	Gap: Enter percent.

We need to close this gap now because Enter how this problem impacts customers. Why do we care about this issue? Example: we need employee ideas to meet changing customer needs.

ASK – What do we know now, and how will we narrow our focus to learn deeply about the problem?

Actions taken so far and their impact on the problem:

Describe strategies used and results achieved. For example, employee idea programs or Lean process improvements that use employee ideas. How have these actions impacted employees' experience at work?

Where in the agency to focus this problem-solving effort:

Pick a group to focus on that is both **reasonably sized** and **representative of the population to be engaged** (e.g., similar work, shift, customers, etc). Criteria to consider include:

- Lower scores (greatest need) and/or connections to other survey items such as input on decisions (#1), opportunities to learn and grow (#5), and using customer feedback (#16).
- Higher customer impact (key business line).
- Other factors, such as function / body of work (e.g., call center, claims or benefits processing), employee turnover, or customer satisfaction data.

The group will be observed to identify current state, so the group should be connected somehow (e.g., location, function, leader, etc.).

OBSERVE – What is actually happening? What are employees experiencing that leads to the problem? (Use Observe Tool to complete this step)

Summary of current situation:

Describe what is going on in the workplace. Which problem (gap between what is and what should be) do we need to address first?

ANALYZE – What is the root cause of the specific problem that you can impact in your role?

Specific problem that prevents employees from feeling encouraged to come up with better ways of doing things:

State the primary problem from the observation.

Ask why this is happening until we get to root cause.

Why? Go see & confirm	**Why?** Go see & confirm	**Why?** Go see & confirm	**Why?** Go see & confirm	**Why?** Go see & confirm

EXPERIMENT: What will we try to solve the problem? (See what other agencies have tried in the Experiment Menu)

Objective:
What is the target result we're trying to achieve?

Hypothesis:
What action do we think will achieve the objective? Use this format: **If we** (try this), **then we** (will get that)

Measures:
How will we measure progress and success?

Plan to address the root cause and achieve the objective:

Action	Who	When

Do and then Check:

Conduct the experiment and compare the results (new state) to the original state from the Observe step. Did we achieve the objective? Was the hypothesis proven? What did we learn?

Next State	Next State
Check Date: Enter date	Check Date: Enter date
Results: Enter measure(s), goal(s), and results	Results: Enter measure(s), goal(s), and results
Objective Achieved? Yes ☐ No ☐	Objective Achieved? Yes ☐ No ☐
Key Learning Enter progress, lessons, etc.:	Key Learning: Enter progress, lessons, etc.

Act/Adjust:
What steps will we take next to continuously improve? How will we use what we've learned from the experiment?

Roles in Improving Employee Engagement

Leaders of Leaders (Senior Managers)**:**
- Build a shared vision for employee experience
- Set clear goals and prioritize resources to problem-solve 1 or 2 aspects of employee experience at a time
- Develop problem-solving skill so you can coach and develop others as problem-solvers
- Focus problem-solving at the right level, allow those closest to the work solve their own problems with your support/guidance
- Create purpose, capacity, safety, and urgency for change so that others are inspired to participate
- As a leadership team, frequently discuss progress toward and barriers to the ideal employee experience

Leaders of Others (Line Managers)**:**
- Cascade the shared vision for employee experience
- Problem-solve and shape the daily employee experience
- Develop problem-solving skill so you can coach and develop others as problem-solvers
- Focus problem-solving at the right level, allow those closest to the work to solve their own problems with your support/guidance
- Elevate problems/issues that are outside of your scope of control
- Help others understand the need for and impact of changes to create buy-in
- Identify what drives your team members, and remove barriers to their success

Leaders of Work – HR & Training:
- Provide advice and expertise about employee engagement/experience
- Coordinate leaders' problem-solving efforts to improve employee experience
- Provide opportunities to develop leaders' and employees' problem-solving skills
- Develop problem-solving skill so you can coach and develop others as problem-solvers
- Focus problem-solving at the right level, allow those closest to the work to solve their own problems with your support/guidance
- Elevate problems/issues that are outside of your scope of control
- Incorporate employee experience vision (values and principles) into HR systems (recruitment, development, performance management, etc.)
- Administer employee survey and connect results to business outcomes to build business case for improvement

Leaders of Work – Lean Advisor:
- Provide advice and expertise about problem-solving, coaching, and Lean principles
- Facilitate development of others' problem-solving and coaching skills
- Provide tools and resources to support problem-solving and coaching
- Provide opportunities to create capacity through improvement efforts
- Focus problem-solving at the right level, allow those closest to the work to solve their own problems with your support/guidance
- Elevate problems/issues that are outside of your scope of control

Leaders of Work – Other Roles:
- Communicate the shared vision for employee experience
- Participate in change and role model support for others
- Develop problem-solving skill through practice
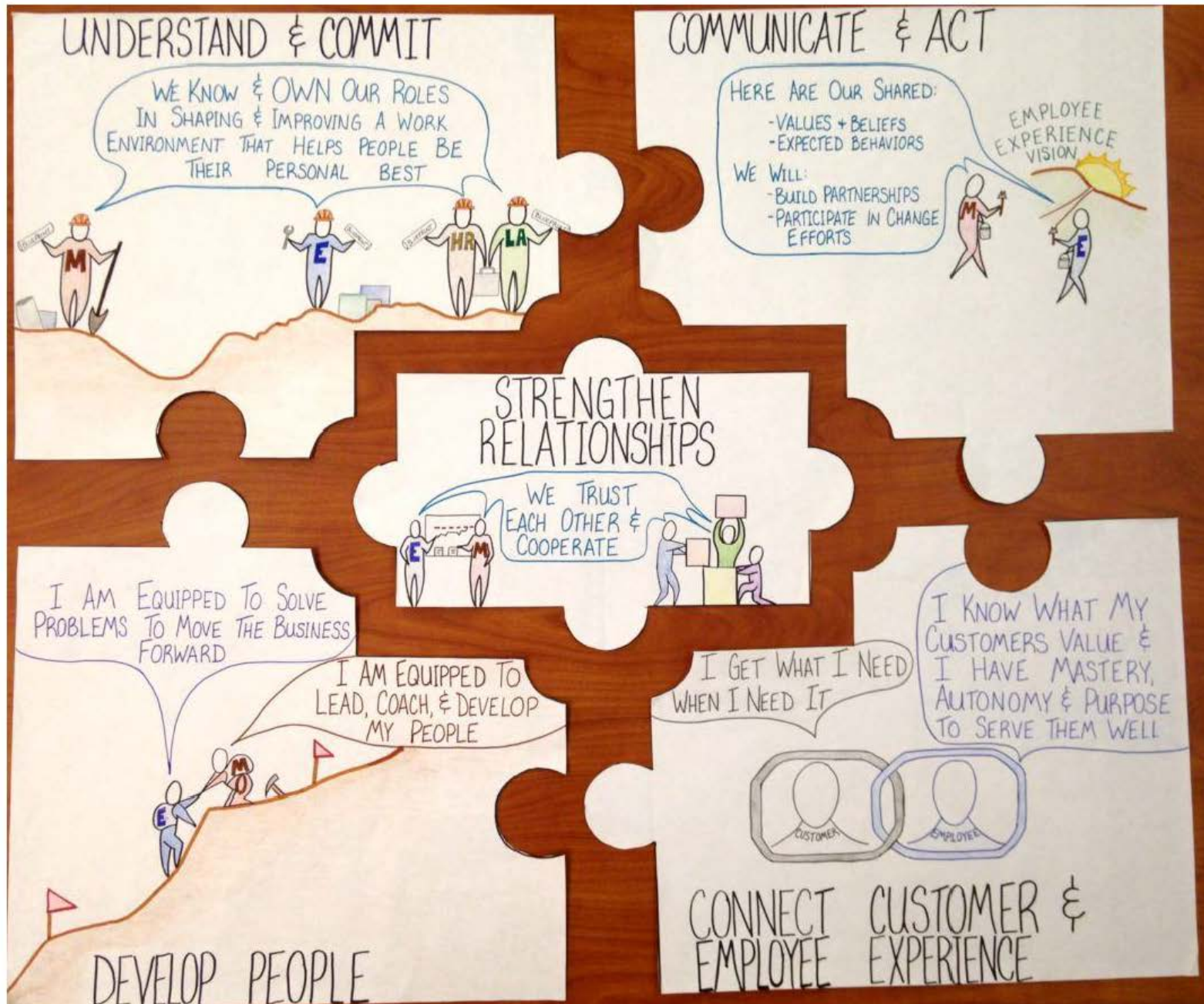- Elevate problems/issues that are outside of your scope of control

EMPLOYER OF CHOICE

LEARNING
TOOLS

02.04.2014

HR Managers Meeting

UNDERSTAND & COMMIT

WE KNOW & OWN OUR ROLES IN SHAPING & IMPROVING A WORK ENVIRONMENT THAT HELPS PEOPLE BE THEIR PERSONAL BEST

- **Senior leaders:**
  - Set the tone, goals, & expectations
  - Model behaviors & develop them in others
  - Create capacity, safety, & urgency for change

- **Line managers:**
  - Shape the daily work experience
  - Help others understand changes & their impact
  - Coach & enable others

- **Human Resource & Lean advisors** provide expertise & development opportunities

- **Employees** actively seek out ways to engage & to improve daily work experience

- Employee experience is not a task that can be delegated
- Roles and structure (interconnections) must be defined

How do we create a shared blueprint for shaping a better employee experience?

COMMUNICATE & ACT

HERE ARE OUR SHARED:
- VALUES + BELIEFS
- EXPECTED BEHAVIORS

WE WILL:
- BUILD PARTNERSHIPS
- PARTICIPATE IN CHANGE EFFORTS

EMPLOYEE EXPERIENCE VISION

Leaders and employees share clarity about:
- Where we are headed and why it's better
- Standards or expectations around employee experience
- Key actions that will help us change and learn

Structured problem-solving, experiments, and measures of success beyond the annual survey are used to improve employee experience.
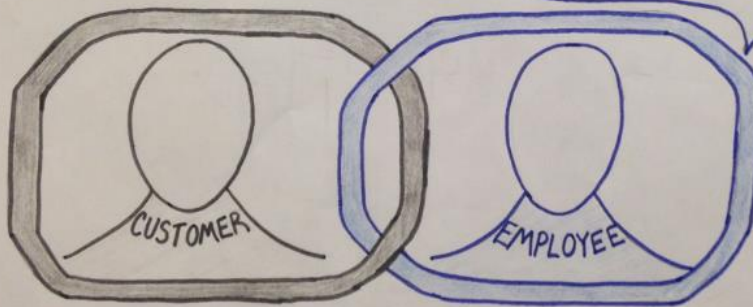
- Without a clear, unified, foundational vision (target) for employee experience, it's difficult to problem-solve

What does the ideal employee experience look like?

Handwritten poster:

I GET WHAT I NEED WHEN I NEED IT

I KNOW WHAT MY CUSTOMERS VALUE & I HAVE MASTERY, AUTONOMY & PURPOSE TO SERVE THEM WELL

CUSTOMER   EMPLOYEE

CONNECT CUSTOMER & EMPLOYEE EXPERIENCE

Customers:
- Have opportunities to share their experience and what they value

Employees:
- Understand how they're directly impacting customers
- Are enabled to make improvements for their customers

Leaders:
- Foster understanding of both the process and results
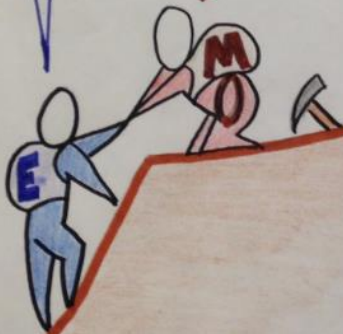- Remove barriers that prevent improvement

- Rolled up customer satisfaction data can't substitute for personal knowledge about impact

How can we create short, direct feedback loops between customers and employees?

I AM EQUIPPED TO SOLVE PROBLEMS TO MOVE THE BUSINESS FORWARD

I AM EQUIPPED TO LEAD, COACH, & DEVELOP MY PEOPLE

DEVELOP PEOPLE

- People are developed through experience solving real work problems one at a time.

- People receive:
  - Training
  - Tools
  - Time to practice
  - Coaching & feedback
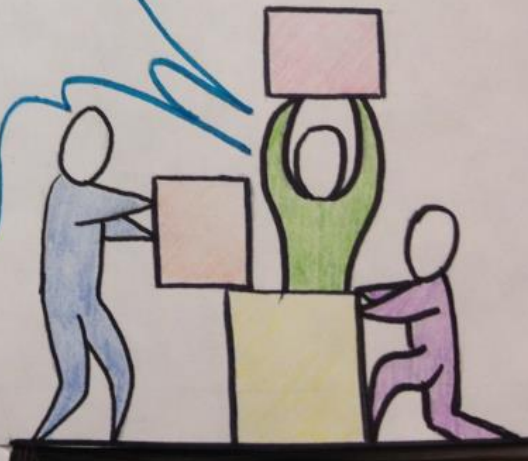 - Safety to fail and learn

- Treating development and problem-solving as an add-on to 'regular work' limits our capacity for improvement

How can we make problem-solving and learning the way we approach work?

- The condition of relationships is assessed as part of improving employee experience

- Trust and relationship repair are built into action plans

- Ignoring relationship dynamics limits our capacity for improvement

How can we constantly strengthen relationships?

Tools

Employee Engagement Problem-solving Guide

- Guidance for Steps in Problem-solving
- Problem-solving Worksheets
- Observation Tools
- Experiment Description

Role Descriptions

QUESTIONS

Employee Engagement Problem Solving Guide
Experiment Description

CONTACT INFORMATION	
Agency:	
Contact Name:	
Phone Number:	
Email:	

PROBLEM STATEMENT – What specific problem (gap) did you address?

EXPERIMENT – Describe the details of the experiment

Objective:

Hypothesis:

Measures:

Plan to address the root cause and achieve the objective: (you may paste a Word table or Excel action plan below)

Click Here to Paste
Or click here to type

Results/Progress and Learning:

Challenges experienced and how they were addressed:

Considerations for others adapting this experiment:

SCOPE & CONTEXT

Employee Group – describe the group of employees on which this experiment focused
    Size of group:
    Nature of their work:
    Primary customers served:
    Other important characteristics:

Resources – describe the resources involved to conduct this experiment
    Role of point person:
    Roles of other team members:
    Why these roles were chosen:
    External resources or assistance (if any):
    Resource 'intensity' / FTE equivalent:

Timeline – describe how long the experiment took to complete, by phase if possible
    Start to Finish:
    Plan: **Do:**   **Check:**   **Act:**